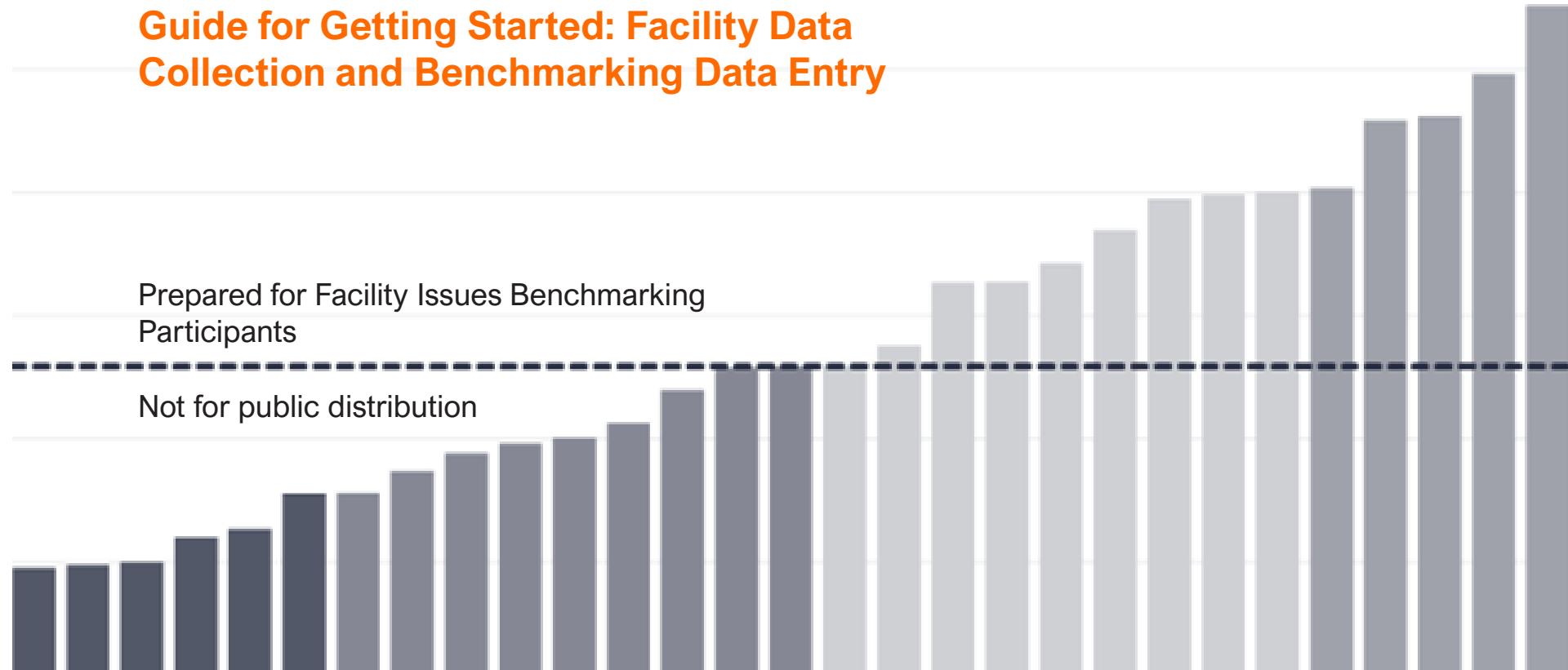


Facility Benchmarking

**Guide for Getting Started: Facility Data
Collection and Benchmarking Data Entry**

Prepared for Facility Issues Benchmarking
Participants

Not for public distribution



Contents

- What and Why of Benchmarking
- Clarify Benchmarking Objectives
- Assemble Your Data
- Using the Facility Issues Website
- Using the Data Template
- Additional Q&A

What and Why of Benchmarking

Organization Review

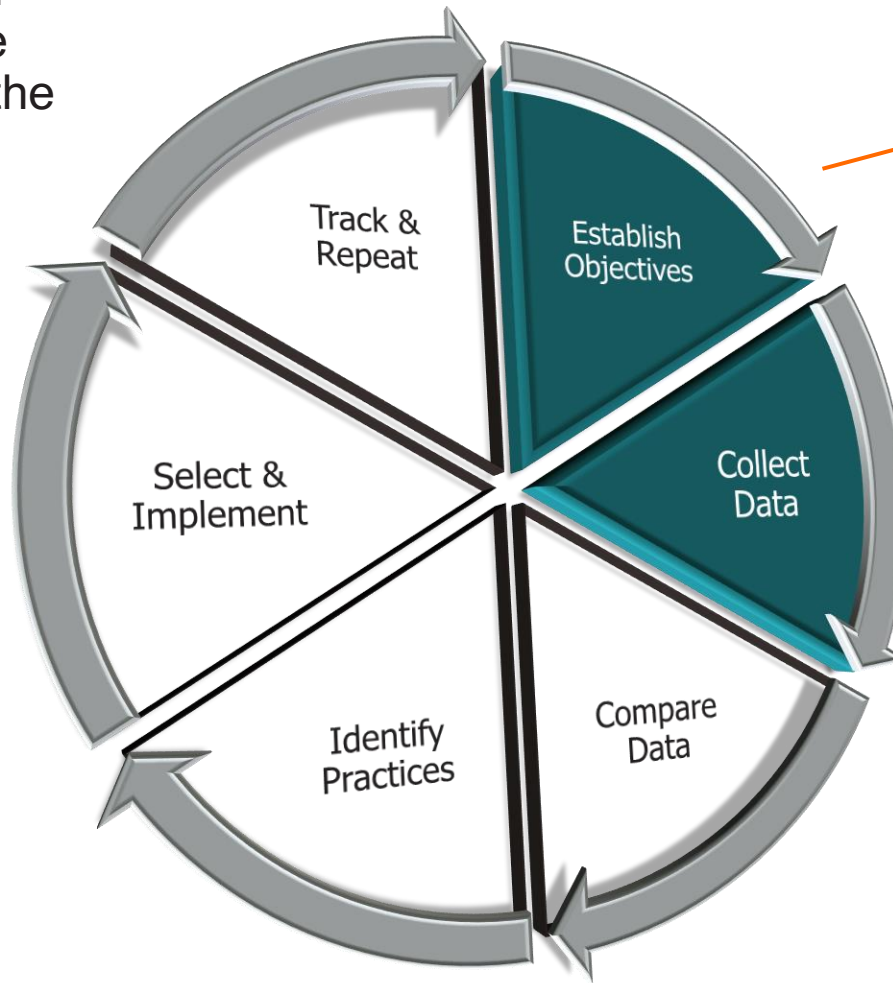
- Assess performance vs. peers
 - Document where you are an industry leader
 - Document adequate/competitive performance
 - Identify weak performance areas for review or attention
- Demonstrate responsible performance to leadership, regulators, funding organizations, etc.
- Communicate key metrics with staff and public
- Include in facility scorecards and reporting

FM Planning

- Monitor trends
- Support functional improvement initiatives
- Perform ad-hoc queries to respond to emerging issues/questions
- Share lessons learned & learn from others

The Facility Benchmarking Process

This discussion will address the first 2 steps in the benchmarking process.



Identify Your organization's objectives (What do you want to get out of the benchmarking?)

Based on objectives, determine what data to collect, where to find it, and assemble it. (What data to enter into the benchmarking forms?)

Review the data template and how to load it into the system.

Download: Get Value from the Benchmarking Process:
<https://facilityissues.com/facility-management-benchmarking/value/>

Clarify Benchmarking Objectives

Align with your organization's mission, strategy, situation, and priorities.

Typical Objectives Include:

- To quantify your situation (internally)
- To learn how you compare (vs. industry)
- To identify areas for near term attention
- To justify proposed initiatives
- To promote change/new thinking
- To network with peers
- To learn from others
- To keep getting better

Since benchmarking is an ongoing activity, the objective(s) should be re-visited each cycle to reflect changing needs and priorities.



Info About Your Organization & Department

- General “demographics” and overall metrics
- Staffing – by position type
- Budget – by property and overall items
- Practices – Janitorial, Maintenance, Utilities, Space management...

Info About Your Facilities

- “Demographics” – type, location,
- Size – areas usually from CADD/CAFM systems
- Occupancy – HR reporting system
- Cost – financial reporting system
- Utility Usage/Waste – sustainability reporting, bills

There is a huge variety of facility-related data!

Identify the data types that align with your benchmarking priorities.

Identify the systems that have this data.

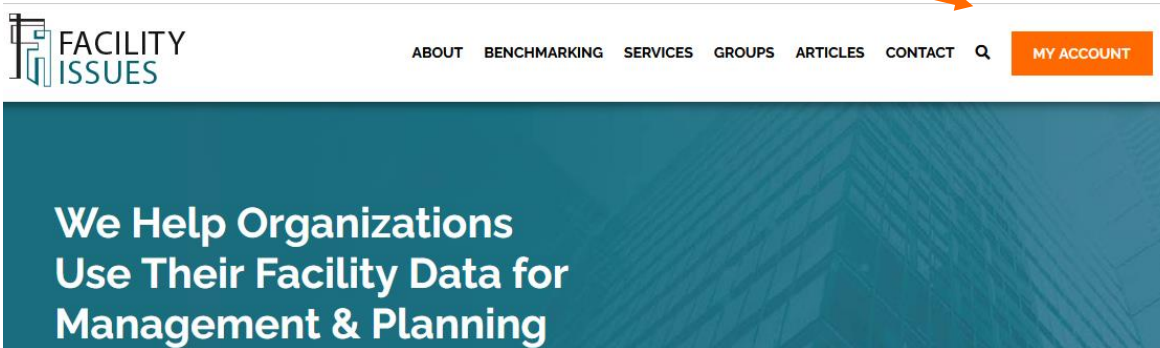
Assembling Your Data

Identify the data you will need for benchmarking and assemble it:

- Use the benchmarking template to identify specific types of data
- Start with what you have readily available:
 - Department excel files about your properties
 - Annual reports on finances, employees, staffing, etc.
 - Knowledgeable persons in department (about your practices)
- Focus on your areas of most interest:
 - What are your benchmarking objectives?
 - What topics are of current interest to your leadership?
 - Suspected areas with opportunity for improvement?
- Identify what data you want/need to build for next year
- Contact us if you want help assembling your data

Using the Facility Issues Website

1. <https://facilityissues.com>
2. Click on the orange “My Account” button



3. Login (or enroll to create new account)

Your Facility Issues Account(s)

You should have your account info as shown to the right:

- Use THIS account to enter your data
- *This account is for the results reporting (described in the reporting guide)*

FACILITY ISSUES

Your Facility Issues Benchmarking Account

This document contains your account information so please take appropriate care of this document and your credentials in general.

Your Organization: **Your name**

Facility Issues Website

Link: <https://facilityissues.com/>
Username: **Your Username**
Password: *not included here because you may have reset it
Name associated with this login: **First and last name of contact person**
Email address associated with this login: **Email of contact person**
Other contact persons on this account: **Other contact persons who get communications**
2018 Sitecode (for report): **Your Code # (on reports)**

Your password can be reset once logged in or recovered using the forgot password link on the website.

Power BI Reporting

Link: <https://app.powerbi.com/>
Username: **Your Username**
Password: **Your Password**

Contact me if you need to reset your password.

Your Account Page

Links to help documents
(including this one)

4. All the programs available to you will be listed on your account page (anytime you want to return to this page you can click on the orange “Enroll/Log In” menu item)

The screenshot shows the 'Your Account Page' interface. On the left, under the heading 'SURVEY(S) ENROLLED IN', there is a list of programs: Facility Managers Roundtable, Museums & Cultural Institutions, Research Facilities, and Utilities Council. Below this list are sections for 'Core metrics', 'Critical Facilities', and 'Energy Use Intensity'. At the bottom, there is a 'PAYMENT STATUS' section with links for 'Unpaid Pay My Bill' and 'Log Out'. On the right, under the heading 'INSTRUCTIONS AND TIPS', there is a note: 'Pages with reference documents will open in a new window.' followed by a list of links to help documents, including 'Getting Started PDF - What's new in 2021? PDF', 'Guide to the Facility Issues website: PDF Video', 'Entering your data with online forms: PDF Video', 'Entering your data with Excel template: PDF Video', 'Other Benchmarking reference info: Webpage', 'Compendium of Facility Metrics & Measures PDF', 'Benchmarking Participant Agreement: Webpage', 'Guide to the Microsoft PowerBI report: PDF', 'Open the Report (PowerBI login using @facilityissues.net account or Open using your own PBI account)', and 'Getting value from your benchmarking report: Webpage'. An orange arrow points from the text in step 4 to the 'Research Facilities' program in the list. Another orange arrow points from the text in the orange box to the 'Getting Started PDF' link in the help documents list.

5. Hover your mouse over the program you want to use, and you will see new links appear – click the “Go To Survey” link

This is a close-up of the 'Research Facilities' program menu. The menu is displayed as a horizontal bar with the text 'Research Facilities' in blue. Below it, there are three links: 'Go To Survey' in red, 'Members Area' in blue, and 'Edit Properties' in blue. A mouse cursor is hovering over the 'Go To Survey' link.

Cost Survey Home Page – For Online Data Entry

(The main benchmarking program was traditionally called the cost survey)

- The list of properties is the top left of the page. The survey form will show different survey sections for organization/department vs. property data based on the item selected on the top left.

“All Properties” is organization level data.

The screenshot shows the 'COST SURVEY' home page. On the left, under 'MY PROPERTIES', the 'All Properties' option is highlighted with an orange box. An orange arrow points from this box to the 'NEXT SECTION' button in the main content area. The main content area displays a welcome message: 'Welcome to your cost survey. This online survey is an important part of the benchmarking process. It contains a series of questions that are designed to collect the data we need to assess trends and identify best practices for your group. The questions are divided into eight or nine sections, as shown in the'. On the right, there is a progress bar at 30%, 'SURVEY LINKS' (Organization Info, Facility Services, Best Practices, Performance Survey, Learning From Others, Feedback), and 'MEMBERS ONLY'.

All the properties you benchmark are listed and can be selected

The screenshot shows the 'COST SURVEY' home page with 'Office Building' selected in the 'MY PROPERTIES' list, highlighted by an orange box. An orange arrow points from this box to the 'NEXT SECTION' button. The main content area shows 'Section F: Property Info » Property Demographics' and a 'Purpose' statement: 'Purpose: In this section, you will define your properties and classify them by type and other attributes that can be used to filter the reports.' Below this is a checkbox: 'Check here if the following section does not apply to you.' and 'expand all | collapse all' links. On the right, the progress bar is at 22%, 'SURVEY LINKS' includes 'Property Info' (Property Demographics, Property Areas, Occupancy and Use, Property Operating Expenses, Utility Consumption / Waste), and 'MEMBERS ONLY'.

Data Entry With Online Forms

7. The survey forms are self-explanatory.

COST SURVEY
Section A: Organization Info » Organization Demographics

Purpose: Data reported in this section will be used to identify similar organizations and may be used by the participants to filter the reports. Some data reported in this section defines the units of measure or is otherwise used to administer the survey and is not included in the reports (these are identified and your actual data will not be reported). **This section is required.**

Check here if the following section does not apply to you.

[expand all](#) | [collapse all](#)

ABOUT YOUR ORGANIZATION

Organization name and address: ✓ **i**

Type of organization: * ✓ **i**

Ok to share your name? ✓

i 3-6 character acronym to use in the report ✓

SURVEY LINKS

- Organization Info
- Organization Demographics
- Staffing Info
- Overall Budgets
- Technology Used
- Facility Services
- Best Practices
- Performance Survey
- Learning From Others
- Feedback

Survey forms are grouped by section – click heading to open/close list, click section to load the form

Click the small blue “i” for information about the data to be entered

As you enter data, there will be a little green check as it is saved (short lag)

Cost Survey Home Page – For Excel Template

(The main benchmarking program was traditionally called the cost survey)

6. If you wish to delete a property, use the icon on the list of properties is the top left of the page..
7. Download and upload data with the Excel template by using the buttons on the left.

The screenshot shows the 'MY PROPERTIES' section on the left and the 'COST SURVEY:' section on the right. Three orange callout boxes provide instructions:

- Delete property here:** Points to a trash icon next to 'HOME - Historic res...' in the 'MY PROPERTIES' list.
- Click Create Excel File button, wait a minute and then click file link to download template:** Points to the 'Create Excel File' button under the 'DOWNLOAD AN EXCEL COPY OF YOUR COST SURVEY DATA' section.
- Click Browse to select completed data file and click Upload. Wait until you see green bar on top of page (success) or error message:** Points to the 'Browse...' button under the 'UPLOAD AN EXCEL FILE OF YOUR COST SURVEY DATA' section.

A smaller inset screenshot at the bottom left shows a green success message: 'SUCCESS: Your file was uploaded and processed successfully. Thank you!' above the 'MY PROPERTIES' list.

Using the Data Template

When first opening, you may need to enable editing or manually recalculate the sheet for data to display (check the site code and email to confirm)

Section	Import This Section?	Section Reviewed
Site code assigned by Facility Issues; for information only.	0	
Contact person's email - edits must be made on Facility Issues website.	0	
ORGANIZATION INFORMATION		

Excel Template – Instructions Tab

The Instructions sheet shows status of data for this file, lets you track data “assignments” and identifies sections to upload

DATA TEMPLATE

Use these worksheets to collect and organize your data. Download instructions: <https://facilityissues.com/link/data-instructions/>

Fields are color coded to identify those that are most important and also new items from last year

showing 0), then press <Ctrl> + <Alt> + F9 keys.

Tips for prioritizing data:
Fields with * in Bold or with dark background are key data items.
Sections highlighted like this are "optional."
Sections highlighted like this are new or revised this year.

List of all the available sections (tabs) with hyperlink to that section

Import data from this file, select YES (in column C) for those items that you wish to import. This file will replace that entire section (and only that section) in the system.

Data Sections:		These columns just for your use				
ORGANIZATION & DEPARTMENT INFORMATION		Import This Section?	Section Reviewed	Impt. Questions	Percent Completed	Use this column to track who completes each section
A	Section A: Organization Info >> Demographics (Required)	No	No	8	0%	
B	Section B: Organization Info >> Property Staffing	No	No	11	0%	
C	Section C: Organization Info >> General Costs	No	No	4	0%	
D	Section D: Organization Info >> Facility Operations Greenhouse Gas	No	No	3	0%	
PROPERTY INFORMATION		Import This Section?				
Property Info >> Definitions (For Sections F-K)		Definitions Only	# Properties: 0			
F	Section F: Property Info >> Demographics (Required)	Yes	No	6	0%	
G	Section G: Property Info >> Areas	No	No	4	0%	
H	Section H: Property Info >> Space Types	No	No	0	0%	
I	Section I: Property Info >> Occupancy and Use	No	No	3	0%	
J	Section J: Property Info >> Operating Expenses	No	No	9	0%	
K	Section K: Property Info >> Utility Usage, Waste, GHG	No	No	3	0%	

“Guides” show approximate completion by section and let you note status

Units tab lists units of measurement definitions

Select “Yes” for sections to upload

Excel Template – Organization/Department Tab

Single column for data with definitions adjacent.

Survey topic/question, the units and description of the data to enter.

Link to return to contents tab

ID	Topic / Question	Your Answer/Data	Units	Clarification
Section A: Organization Info >> Organization Demographics (Required)				Return to Table of Contents
Data reported in this section will be used to identify similar organizations and may be used by the participants to filter the reports. Some data reported in this section defines the units of measure or is otherwise used to administer the survey and is not included in the reports (these are identified and your actual data will not be reported). This section is required.				
	Have you reviewed the following data for accuracy?	Yes	List	Prior year's data may have been pre-filled and should be confirmed.
ABOUT YOUR ORGANIZATION				
ORG_NAME	Organization name and address	Example Research	Text	Used for administration only.
ORG_TYPE	Type of organization	Research-Non-Profit	List	Select the one category that best describes the primary industry/focus of your organization.
ORG_SHARE	Ok to share your name?	OK to share our sitecode with others in the group who share theirs	List	Are you willing to share your sitecode with others in the group? Used for administration only
ORG_ID	3-6 character acronym to use in the report		Text	This will be the label used on the charts instead of a sitecode if you are willing to be identified. Leave blank for default sitecode.
FM_ORG	Where does the facility management organization report?	Operations	List	Select the best match of the top level executive who's organization includes facilities management (and facility projects /other services reported in this benchmarking survey).
FM_STAFFED	Facility Management Staffing Approach	Outsourced, all but a few key staff.	List	Select the option that best matches the approach for how you staff your facility maintenance and operations group.
UNITS OF MEASURE				
UNITS	Un	English Units	List	English units = square feet, acres, gallons, degrees F, etc.; Metric units = square meters, hectares, liters, degrees C, etc.

Enter your data

Excel Template – Property Data Tab

Table with row for each Property – how you organize them is up to you. Definitions in a separate tab.

Links to contents tab and data definitions

Survey topic/questions and units for the data to enter.

[Return to Table of Contents](#)

[See Definitions](#)

PROPERTY IDENTIFICATION								
Property ID	Property Name*	Property Address*	Property Location - Postal code*	Include in Benchmarking*	Number of Days in Service*	Property Nature	Property Setting	Property Type
BLDGID	BLDGNAME	PROP_ADDR	PROP_POSTAL	PROP_INCLUDE	PROP_DAYS	PROP_NAT	PROP_SET	PROP_TYPE
Text	Text	Text	Text	List	Days	List	List	List
OFF	Office Building		13403	Yes	365	Stand alone or single building	Suburban Area	Office/General Admin
LAB	Lab		13403	Yes	365	Multiple buildings grouped together	Suburban Area	Laboratory
SHOP	Shop			Yes	300	Stand alone or single building	Suburban Area	Light Industrial/Shops
CENTER	Central Meeting			No				
ANNEX	Office Annex		13403	Yes	50	A space within a building	Suburban Area	Office/General Admin

Property IDs – SAME ORDER on all sheets

Enter your data by row – can use all normal Excel formulas, lookups, and copy/paste from other sheets – NO CUT/PASTE!

Property Info Definitions

Clarifications for property data fields

Excel Template – Some Details

ID	Topic / Question	Your Answer	Units	Clarification
OX_F_INSU	General Property Insurance		Curr	Include property and casualty insurance costs for amounts paid or charged to budget.
OX_I_TECH	The cost of all your property-specific information systems		Curr	Include subscriptions, license fees, use fees, tech use/maintenance of all property-specific system BMS, EMS, mass notification, smart tracking systems acquisition, user training, staff, and contractor; other sections of the survey such as maintenance
CX_TECH	The setup cost of all your property-specific information systems.		Curr	Include all "one-time" costs associated with new above. Include cost of initial data acquisition or not report this cost in other sections of the survey improvements.
CAPITAL INVESTMENT				
CX_BLDG	Capital Renewal *		Curr	All expenditures over and above those in your m required to keep the facilities in reliable operati includes all 1-for-1 replacements but not signifi costs for building and building services only.
CX_IMPRV	Capital Improvements		Curr	All expenditures the change the size or function benchmarking survey; include ad stacks/densification projects, an
CX_SITE	Site Capital Renewal *		Curr	All expenditures over and above required to keep the site (paveme operating condition for the prese
CX_IMPR_SITE	Site Capital Improvements		Curr	All expenditures the change the e utility mains); include reconfigur development.
TOTAL COSTS				
Include all expenses incurred in including exhibitions, education, recreation				

Template/data items new this year

“Core” or important data items

Optional data items

Property Type *	Property Nature
PROP_TYPE	PROP_NAT
List	List

	Field ID	Data Range	Bldg ID	
F	Section F: Property Info >> Demographics (Required)	DemogFields	DemogData	DemogRows
G	Section G: Property Info >> Areas	AreaFields	AreaData	AreaRows
H	Section H: Property Info >> Space Types	SpaceFields	SpaceData	SpaceRows
I	Section I: Property Info >> Occupancy and Use	OccupFields	OccupData	OccupRows
J	Section J: Property Info >> Operating Expenses	OpexFields	OpexData	OpexRows
K	Section K: Property Info >> Utilities	UtilFields/Bldg	UtilData/Bldg	UtilRows/Bldg
L	Section L: Property Info >> Assets	AssetFields	AssetData	AssetRows
M	Section M: Property Info >> Work Orders	WoFields	WoData	WoRows

Named ranges to let you reference external files more easily.

<https://support.microsoft.com/en-us/office/create-an-external-reference-link-to-a-cell-range-in-another-workbook-c98d1803-dd75-4668-ac6a-d7cca2a9b95f>

Questions, Problems, or Suggestions?

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